



**PATENT**  
5681-90700/P6515NP

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

Application No.: 09/982,214  
Filed: October 17, 2001  
Inventors:  
Sridatta Viswanath, et al.

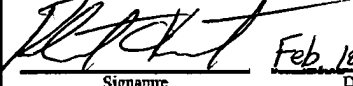
Examiner: Fischer, Andrew J.  
Group/Art Unit: 3627  
Atty. Dkt. No: 5681-90700

Title: Document Exchange  
Framework for Automated  
Extensible Markup  
Language Data in an E-  
Procurement System and  
Method

I hereby certify that this correspondence is being deposited with the United States Postal Service with sufficient postage as first class mail in an envelope addressed to Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450, on the date indicated below.

Robert C. Kowert

Printed Name

  
Signature

Feb 10 2006  
Date

**DECLARATION UNDER 37 C.F.R. § 1.131 OF INVENTION OF  
SRIDATTA VISWANATH AND YAFENG LI**

We, Sridatta Viswanath and Yafeng Li, do hereby declare as follows:

1. We are the inventors of the subject matter of the present patent application no. 09/982,214, titled "Document Exchange Framework for Automated Extensible Markup Language Data in an E-Procurement System and Method" and filed October 17, 2001.

2. Before December 11, 2000 and within the United States we conceived of and began working on the design of a "Document Exchange Framework", embodiments of which are described and claimed in the present patent application.

3. Before December 11, 2000 and within the United States we completed by actual reduction to practice our invention as claimed in the present patent application. During a period of time before December 11, 2000, we designed and developed

embodiments of the present invention for inclusion in version 4.0 of a software product titled BuyerXpert. We satisfactorily tested and reduced to practice our invention before December 11, 2000. As supported by the attached exhibits, BuyerXpert version 4.0 was released to the public by December 11, 2000.

4. Exhibit 1 attached hereto is a copy of a Competitive Intelligence Report, dated December 12, 2000, describing the release to the public of iPlanet Commerce Platform by December 11, 2000. The Competitive Intelligence Report further states that the iPlanet Commerce Platform is a software product including BuyerXpert version 4.0.

5. Exhibit 2 attached hereto is a copy of a Press Release, dated December 11, 2000, describing the release of iPlanet Commerce Platform. The Press Release illustrates that the iPlanet Commerce Platform includes BuyerXpert version 4.0 and was released to the public by December 11, 2000.

6. Exhibit 3 attached hereto is a copy of iPlanet Release Notes for BuyerXpert version 4.0, which indicates that BuyerXpert 4.0 was created, and thus actually reduced to practice, prior to December 11, 2000.

7. We hereby declare that all statements made herein of our own knowledge are true and that all statements made on information and belief are believed to be true, and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under §1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the application of any patent issued thereon.

Name: Sridatta Viswanath

Signature: 

Date: 2/9/06

Name: Yafeng Li

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



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Name: Sridatta Viswanath

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name: Yafeng Li

Signature: Yafeng Li

Date: 2/10/2006

## Current Analysis



### Current Analysis

>> **Application Services**

>> **Integration Services**

>> **Portal Services**

>> **Commerce Services**

#### Buy Side

Sun Microsystems Company  
Assessment

Company Assessments

Compare Competitors

Compare Products

Tactics

Latest Analytical News

#### Sell Side

Sun Microsystems Company  
Assessment

Company Assessments

Compare Competitors

Compare Products

Tactics

Latest Analytical News

#### eMarketplaces

Sun Microsystems Company  
Assessment

Company Assessments

Compare Competitors

Tactics

Latest Analytical News

>> **Financial Services**

>> **Identity Management**

>> **Feedback**

>> **Main Page**

[Summary](#) | [Perspective](#) | [Positives and Concerns](#) | [Recommended Actions](#)

## iPlanet Makes Its Play to Architect the Net Economy

Type: **Competitive Intelligence Report**

Analyst: J. Marino

Report Date: December 12, 2000

Current Perspective: Positive/Neutral

Vendor Importance: Moderate/High

Market Impact: Moderate

### Summary

#### Event Summary

December 11, 2000 - iPlanet unveils its next-generation commerce platform, which includes buying, selling, billing, market making, and trade facilitation software solutions, designed exclusively for the Internet to deliver continuous services with massive scale. The iPlanet Commerce Platform contains the company's Java-based business applications, including iPlanet BuyerXpert, iPlanet BillerXpert, iPlanet TrustBase Transaction Manager, iPlanet Market Maker, and iPlanet SellerXpert. The iPlanet BuyerXpert 4.0, BillerXpert B2B, and TrustBase Transaction Manager 2.2 products are available immediately.

#### Analytical Summary

· **Current Perspective:** Neutral to positive on iPlanet's launch of its B2B commerce (a.k.a. ISDP) platform, and new product upgrades, because the company provides vision and positioning for its core technologies and services, but is inconsistent in its delivery of commerce applications.

· **Vendor Importance:** Moderate to high on iPlanet, because the company takes a leadership role in positioning its product portfolio to address the larger e-commerce and communications issues of the Net economy, and establishes a framework to accelerate cross-sale opportunities of its extensive portfolio of commerce services and applications.

· **Market Impact:** Moderate on the Net markets infrastructure, buy-side applications, sell-side applications, and Internet billing segments, because the positioning relies on well-established services, applications, and technologies, and further development is necessary to deliver on the promise of re-architected platforms, speed to market, ease of use, and integration facility.

#### Target Markets

- ASPs
- Global 2000
- Systems Integrators
- B2B Communities
- Large Enterprises
- Web Portals

[Back to Top](#)

### Perspective

Current Perspective : Positive/Neutral

We are taking a slightly positive stance on iPlanet's launch of its B2B Commerce Platform, because iPlanet has laid out the vision for its Internet Services Deployment Platform (ISDP), but is inconsistent in its delivery of commerce applications and services.

iPlanet's B2B Commerce Platform or ISDP leverages the company's portfolio of services, middleware, and integration technologies that sits on top of the OS and hardware base, and is the platform on which resides the commerce applications. The ISDP is comprised of User Management Services, Web, Application and Integration Services, Communications Services, and Portal Services that is the software environment that supports iPlanet's SellerXpert, BuyerXpert, Market Maker, BillerXpert, and TrustBase applications. Few competitors approach, in-house, the marshalling of such a full palette of technologies, services, and applications. iPlanet's commitment to Java component-based architecture and open standards ensure that the platform will remain apace industry developments, and is able to accommodate third-party solutions.

Conceptually, iPlanet positions the ISDP as a next-generation e-commerce and communications platform to enable organizations to define richer business processes in order to take advantage of the Net economy. Here, the challenge of translating business processes to open systems is to create new forms of values and new modes of, and models for competitive advantage. Operationally, the emphasis is on speed to market, ease of use, and integration of business processes afforded through a common platform infrastructure. iPlanet is positioned with its strong suite, and large installed base of middleware and services to engineer solutions integrating applications through the infrastructure platform. Practically, iPlanet can leverage one component or application to sell another, or make the case for the value proposition of, for example, using BillerXpert and Trustbase with Market Maker to architect an Internet business payments solution to extend transactional value throughout the supply-demand chain.

Competitors are likely to say that there is not much to iPlanet's ISDP announcement, and that it represents more of a marketing initiative or repackaging of available technologies and services. Furthermore, there is no common look and feel across all applications. BuyerXpert and Market Maker have not evolved to one platform with objects, BuyerXpert is not yet re-architected on top of Application Server, and SellerXpert is re-architected, but in the "early access" stage before release.

Ultimately, e-commerce solutions are designed to solve business problems, and in competitive sales situations iPlanet will need to compete on the strength of its services and applications. As mentioned above, the middleware technologies and services are strong, and iPlanet is able to leverage its large, installed base of Directory Server, Web Server, and Application Server. The BuyerXpert 4.0 upgrade is overdue, the sell-side application is more competitive in terms of core functionality, and iPlanet has strengthened its supporting catalog services through agreements with Requisite and Wiznet, although iPlanet still has no supplier network strategy (direct or indirect). With Market Maker in controlled release, iPlanet faces an uphill struggle in gaining market share against competitors that are more fleet afoot – especially with those rivals that have optimized the many collaborative processes and services across multiple domains, including procurement resources both for indirect and direct materials, and product development/planning processes through supply chain and logistics execution.

BillerXpert B2B Edition strengthens an already very strong IBPP application. BillerXpert 4.5 is re-architected on Application Server, and the B2B functionality is replete with hierarchical billing, workflow and permissioning, dispute resolution, and multi-currency and multi-language capabilities. iPlanet has leveraged its leadership role with the Identrus authentication initiative. iPlanet's TrustBase service is an important value-add to facilitate trade services within the digital marketplace environment. In coordination with Trustbase, iPlanet is able to position BillerXpert B2B as the focal point of an Internet business payments service which includes corporate payments, cash management, invoice presentment and dispute resolution, reconciliation, and credit and risk management services for e-procurement and e-marketplace settlement processes.

iPlanet's new release of SellerXpert is anticipated in the Q2 2001 timeframe. We caution the urgency with which iPlanet needs a timely sell-side application optimized for the B2B segment. We recommend to address important time to market issues that the iPlanet consider an acquisition where InterWorld would be a prime candidate on the basis of its very strong technology and core functionality and its well architected B2B vision.

[Back to Top](#)

## ► Positives and Concerns

### Competitive Positives

- iPlanet takes a leadership role in positioning its product portfolio to address the larger e-commerce and communications issues of the Net economy.
- iPlanet establishes a framework to accelerate cross-sale opportunities of its extensive portfolio of commerce services and applications.
- The iPlanet ISDP supports Java component-based architecture and open standards, which ensures that the platform will remain apace industry developments and accommodates third-party solutions.
- iPlanet upgrades its BillerXpert application for the important Internet business billing market, and positioned itself to target the market for Internet business payments that is foundational to building collaborative processes and extending transactional value throughout the supply-demand chain.
- iPlanet upgrades its BuyerXpert application to strengthen its competitive position in the buy-side applications segment with improved functionality and supporting catalog services through agreements with Requisite and Wiznet.

### Competitive Concerns

- iPlanet's B2B Commerce or ISDP platform do not introduce any new developments beyond the three product upgrades, and represents the mapping of a vision that competitors will likely attack for lack of substance.
- The strength of iPlanet's ISDP platform is in its middleware applications and services, and the company has not articulated a strategy of how it will provision the services and establish the partnerships required to support the collaborative processes of B2B commerce.
- iPlanet is late to market in upgrading its BuyerXpert applications, and continues to risk loss of market share with the 2001 release dates of its SellerXpert upgrade and its Market Maker solution.
- iPlanet did not support the general ISDP launch with separate press releases or spec sheets detailing the three upgraded products undermining the effect of the event.

[Back to Top](#)

## ► Recommended Actions

### Recommended Vendor Actions

- iPlanet needs to develop a coordinated marketing and sales program because the ISDP vision will not sell itself, and individual sales representatives will be pressed to get command of the cross-sell opportunities afforded by the overall positioning strategy.
- With the vision in place, iPlanet needs to focus on the challenges required to implement B2B commerce, and provide a detailed map outlining the provisioning of services and establishment of partnerships that support the many collaborative processes across multiple domains, including procurement resources both for indirect and direct materials, and product development/planning processes through supply chain and logistics execution.
- iPlanet should leverage its BillerXpert B2B edition and its TrustBase service to take a leadership position among IBPP technology vendors in targeting Internet business payments to facilitate trade services within the digital marketplace environment.
- Speed to market is critical when competing in the Net markets space, and iPlanet should accelerate its Market Maker release, and the marshalling of services and alliances required to make it an effective solution.

- iPlanet should consider a major acquisition in the sell-side applications space to bolster its position and to address the time to market issues facing SellerXpert. In addition, an important consideration is the optimization of sell-side commerce specifically for B2B applications where a competitor such as InterWorld has highly regarded functionality and vision:

#### **Recommended Competitor Actions**

- On the surface, competitors do not need to address directly the iPlanet ISDP launch because, beyond the product upgrades, iPlanet relies on well-established services, applications, and technologies and does not introduce anything immediately threatening their competitive position.
- Competitors should be aware that iPlanet's ISDP is not an effort to enter into a functionality escalation technology arms race, but a deliberate strategy to build upon its product suite strengths in commerce middleware applications and services that could make iPlanet a more formidable rival in competitive sales situation for their applications.
- IBPP technology providers should be aware that iPlanet is strongly positioned to leverage its Internet billing and Trustbase services to provide Internet business payments, reconciliation, and trust services for e-procurement and e-marketplace settlement processes.
- Buy-side applications should recognize that BuyerXpert 4.0 makes iPlanet much more competitive in the e-procurement space, despite the company's underdeveloped supplier network strategy.

#### **Recommended End User / Customer Actions**

- Current customers of iPlanet's core infrastructure applications and services should be well aware of the opportunities provided for developing an integrated environment on which to base key applications sets.
- Prospective clients of iPlanet core infrastructure applications and services should be aware of iPlanet's commitment to provide a more tightly integrated platform supporting applications and infrastructure.
- Prospective Internet billing clients should consider iPlanet as a strong option when comparing solutions from Avolent, edocs, and Alysis.
- Prospective buy-side applications clients should consider iPlanet as a strong option when comparing solutions from Ariba, Clarus, Commerce One, and Oracle.

[Back to Top](#)



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## Press Releases

### **iPlanet Unveils Industry's First Full-Up B2B Commerce Platform** **New commerce applications leverage smart services and Internet Service Deployment Platform to deliver integrated e-commerce solutions; BP, ECsoft, Firmbuy and John Hancock Among Customers and Partners Adopting iPlanet Commerce Solutions**

**NEW YORK, NY., December 11, 2000** - iPlanet E-Commerce Solutions, a Sun-Netscape Alliance, today unveiled its next-generation commerce platform, the industry's first to include buying, selling, billing, market making and trade facilitation software solutions, designed exclusively for the Internet to deliver continuous services with massive scale.

The iPlanet Commerce Platform contains all of the company's next-generation Java-based business applications, including iPlanet BuyerXpert, iPlanet BillerXpert, iPlanet TrustBase Transaction Manager, iPlanet Market Maker and iPlanet SellerXpert. Each of these applications leverages the infrastructure platform, enabling customers to offer smart services in a dynamic e-commerce environment. The iPlanet Commerce Platform delivers the next level of integration, secure identity, extensibility and customizability to accommodate the demands of commerce on a global scale.

"While buying and selling products have been widely available as point solutions, a B2B commerce platform must provide a seamless commerce experience - from buying and selling, to billing and trading," said Stuart Wells, senior vice president at iPlanet. "Today we have taken a giant step forward in delivering and extending this vision. With the breadth and depth of our platform, enterprises and service providers are realizing the power of delivering a "full-up" commerce experience through the creation of powerful commerce portals - a commerce environment uniquely customized for their customers, suppliers, partners or employees."

#### **Next-Generation Commerce Platform Available Today**

The iPlanet Commerce Platform includes the following next-generation commerce applications:

- iPlanet BuyerXpert 4.0 is a comprehensive, automated procurement solution that streamlines internal processes and centralizes control of product and service acquisitions. Integrated with the iPlanet Application Server and rearchitected in Java, iPlanet BuyerXpert offers a new, more intuitive user interface, robust workflow, support for direct and indirect purchasing, and other enhancements.
- iPlanet BillerXpert, B2B Edition builds on the success of the BillerXpert (B2C) and BillerXpert Consolidator products to enable a new level of bill presentment and payment that every business can use. iPlanet BillerXpert B2B, which is also integrated with the iPlanet Application Server and architected in Java, offers hierarchical billing, dispute resolution, multi currency support, full workflow management for approvals and dispute resolution, and support for discreet and cyclical billing.
- iPlanet Trustbase Transaction Manager 2.2 enables financial institutions to provide trade facilitation services such as payments, credits and identity verification, to their corporate customers. It provides digital certificates to help manage identity risk, links identity services and back end systems, and allows organizations to interface new services to their existing business systems using XML. Trustbase Transaction Manager 2.2 also includes an implementation of the Identrus Transaction Coordinator specification.

In addition, iPlanet updated the status of two other commerce applications resident in its commerce platform. MarketMaker, introduced this spring, is currently in limited release to selected early deployment customers. It is expected to be broadly available in the first quarter of 2001. Also, the next-generation iPlanet SellerXpert, Enterprise Edition, rearchitected as a Java application on top of the iPlanet Application Server, is currently in Early Access and is expected to be available in the Spring of 2001.

#### **The Power of Integration Between Applications and Infrastructure**

The iPlanet Commerce Platform uniquely leverages the award-winning iPlanet Platform. By bringing it all together, the power of integration can deliver common user management, common security, common install, common administration, common internationalization and common platform support throughout the commerce platform for one-to-one and one-to-many business models.

For example, iPlanet BuyerXpert calls upon personalization and directory services to create in-depth vendor profiles that speed procurement transactions. Its robust workflow service allows the user to establish individually tailored transaction and approval processes. B2B integration services connect with ERP and legacy systems, proprietary systems, databases, EDI and even marketplaces. Portal services allow the creation of a customized procurement portal, providing multiple simultaneous views of commerce transactions, data or information. Commerce communities can be connected through multiple communication vehicles such as e-mail, AOL Instant Messenger, Calendar, Unified Messaging and Wireless devices.

All of these interactions occur in a highly integrated environment that conforms to numerous open standards, including XML, Java, J2EE, PKI, OBI, SOAP, UDDI, EBM XML, OFX/IFX, Spectrum, Identrus and others. In addition, the iPlanet Commerce Platform is the only platform on the market that has strategically integrated Internet bill presentment and payment, as well as secure identity and trust services supporting the Identrus initiative.

"Businesses today are faced with the daunting task of integrating disparate point product solutions to survive in a dynamic commerce environment," said Wells. "Customers are telling us they want a powerful component-based commerce platform that delivers full functionality of enterprise applications and is integrated with iPlanet's scalable and proven infrastructure platform, including unified user management, application and integration, and communications and portal services."

#### **Pricing and Availability**

iPlanet products are offered on a per-CPU or subscription basis. iPlanet does not charge transaction fees for its commerce products, nor does it establish or run its own closed supplier networks or marketplaces. The iPlanet BuyerXpert 4.0, BillerXpert B2B and TrustBase Transaction Manager 2.2 products are available immediately.

#### **Pricing and Availability**

iPlanet E-Commerce Solutions, a Sun-Netscape Alliance, was established in March 1999 by America Online, Inc. (NYSE: AOL) and Sun Microsystems, Inc. [NASDAQ: SUNW] to power the next wave of the net economy through thought leadership, technical innovation, expert services and the creation of exceptional customer satisfaction. The iPlanet Platform is the industry's leading software environment designed to enable rapid assembly and deployment of scalable Internet services. Based on best-of-breed, open and proven technologies, the platform includes the world's #1 Messaging, Directory, Web and Application Servers.

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e-commerce solutions



## iPlanet Release Notes for BuyerXpert 4.0

*Last updated on 11/30/00*

These release notes represent the information available at the release of BuyerXpert 4.0. Electronic versions of these release notes and other BuyerXpert documentation can be found at:

- Customer web site: <http://web.archive.org/web/20010807094048/http://iplanetcustomers.com/>  
(call iPlanet Support for password)
- Technical Support web  
site: [http://web.archive.org/web/20010807094048/http://www.iplanet.com/support/technical\\_resources/buy](http://web.archive.org/web/20010807094048/http://www.iplanet.com/support/technical_resources/buy)

We recommend that you refer to the web site for the latest information prior to installing and setting up your software, and thereafter that you periodically view the most current release notes and manuals.

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This document contains the following sections:

- [What's New in BuyerXpert 4.0](#)
- [Comparison to 3.X](#)
- [Documentation](#)
- [Installation Issues](#)
- [Upgrade Issues](#)
- [Limitations and Known Problems](#)
- [How to Report Problems](#)

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## What's New in BuyerXpert 4.0

- [Portal](#)
- [Advanced Search for Catalogs](#)
- [Timecards](#)
- [Increased Reporting Capabilities](#)
- [Improved Graphical Interfaces](#)
- [High Scalability and Performance](#)
- [Multi-locale Capabilities](#)
- [Real-time Price Calculations](#)
- [Interoperability](#)

## Portal

BuyerXpert 4.0 introduces the BuyerXpert Web Portal, a customized interface to the Internet and BuyerXpert. In addition to displaying whatever Internet services you choose (such as email, stock quotes, newsletters), you can configure the portal to display current data about BuyerXpert, such as information on requisitions that are pending approval.

If you are set up with a single login, when you log on to the portal and click links to the BuyerXpert data, you automatically log on to BuyerXpert without the additional BuyerXpert login screen.

## Advanced Search For Catalogs

This release of BuyerXpert allows you to do advanced searching for any of the following:

- Similar Word Forms--An expansion of a word to different forms. For example, a similar word expansion of GO might include GO, GOING, WENT, and GONE.
- Match on All Words (AND)--A search of all the words given in the search condition. For example, the search string *today tomorrow* results in findings that contain the words today AND tomorrow.
- Match on Any Words (OR)--A search on any of the words given in the search condition. For example, the search string *today tomorrow* results in findings that contain the words today OR tomorrow.
- Sounds Like--A search for words that sound similar to the words given in the search string. For example, the search string "rite" results in findings that contain words such as right and write.
- Inexact Spelling--A search you can use if you are not sure how to spell a word.

## Timecards

The new timecard functionality provides a mechanism for entering billable hours (and their associated project codes, accounting codes, and so on) into the BuyerXpert database as a requisition. Although the user initiates the timecard process at the Welcome screen of the BuyerXpert user interface, the timecard process is actually outside the buying process, using only the following functionality of BuyerXpert:

- Create requisition--Specifically a timecard requisition
- Approve--Using the standard BuyerXpert approval process
- Track--Using the standard BuyerXpert track process
- Transmit--Using ECXpert

[Return to Top of Page](#)

## Increased Reporting Capabilities

In BuyerXpert 4.0, the large repository of diverse reporting capabilities provides for centralized purchasing management, analysis, and control.

## Improved Graphical Interfaces

BuyerXpert 4.0 provides an intuitive user interface with:

- Multiple catalog views
- Advanced search capabilities
- Improved approval process

BuyerXpert 4.0 also provides an advanced administrative interface, now written in HTML, that offers:

- The hierarchical inheritance of rules
- A different interface for super administrators compared to organizational administrators and self administrators
- An Import utility that is integrated with the Admin interface

## High Scalability and Performance

BuyerXpert 4.0 supports reliability and scalability through the leveraging of the iPlanet Application Server, iPlanet Directory Server, and Process Automation Engine.

## Multi-locale Capabilities

BuyerXpert 4.0 supports multi-currency, multi-byte, and multi-character set requirements. These multi-local capabilities encourage global business operations.

## Real-time Price Calculations

BuyerXpert 4.0 performs real-time price calculations for discounts, charges, allowances, promotions, taxation, and shipping. These real-time price calculations reduce input errors and ensure contract compliance.

## Interoperability

BuyerXpert 4.0 automates integration with trading partners by supporting OBI XML generation, iPlanet ECXpert EDI document exchange, and automatic order cancellation.

[Return to Top of Page](#)

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## Comparison to BuyerXpert 3.X

The following table summarizes the differences between the architecture of BuyerXpert 4.0 and BuyerXpert 3.X:

BuyerXpert 3.X	BuyerXpert 4.0
HTML templates	JSPs
Server-side JavaScript	Server-side Java
Submission tables	Servlets

C++ business objects	Java objects + EJBs business objects
CORBA services	Native Java services
Cadis catalog	RDBMS-based catalog
RDBMS-based membership	LDAP membership
Workflow based on JavaScript	Workflow based on iPlanet Process Manager

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## Documentation

The BuyerXpert 4.0 documentation set includes:

- *Release Notes*--Contains important information on the current release of BuyerXpert. Read this document before working with the new BuyerXpert release.
- *Deployment Notes*--Provides guidelines for planning a new BuyerXpert implementation.
- *Upgrade Overview Notes*--Provides overview guidelines for upgrading an existing BuyerXpert system.
- *Concepts*--Describes the over-all functionality of BuyerXpert. Read this document if you are unfamiliar with BuyerXpert.
- *Installation Guide*--Provides instructions for installing the BuyerXpert product and its enabling software.
- *Administration Guide*--Provides reference information and instructions on administering a fully installed BuyerXpert system.
- Admin interface Help--Provides guidelines and instructions for using the graphical administrative interface to administer BuyerXpert.
- User interface Help--Provides guidelines and instructions for performing the procurement tasks of BuyerXpert.
- Catalog interface Help--Provides guidelines and instructions for managing catalogs.

Manuals for iPlanet products can be found at the following web site:

<http://web.archive.org/web/20010807094048/http://docs.ipplanet.com/docs/>

[Return to Top of Page](#)

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## Installation Issues

- [Requirements](#)
- [Patches](#)

### Requirements

The following supporting software is required for BuyerXpert 4.0:

<b>For BuyerXpert 4.0</b>
Solaris 2.6 or 2.8

Netscape Navigator 4.7, 4.75, 4.76, 6.0 or higher, or Internet Explorer 4.0, 5.0
iPlanet Web Server (iWS), Version 4.1 SP3
iPlanet Application Server (iAS), Version 6.0 SP1
iPlanet Directory Server, Version 4.11 or 4.12
iPlanet Process Manager, Version 6.0 SP1
ECXpert 3.0 SP3
Oracle Server 8.1.6 with InterMedia Search Engine
Oracle Client Server 8.1.6
Actuate Report Server, Version 4.1

## Patches

For the Solaris 2.6 operating system, check whether the following patches are installed.

Patches for Solaris 2.6	Status
106040-11 X Input and Output Method patch	Required
105181-15 Kernel patch	Required
105284-25 Motif Runtime Library patch	Recommended
105490-07 Dynamic Linker patch	Recommended
105633-21 OpenWindows 3.6: Xsun patch	Recommended
105568-13 Libthread patch	Recommended
105210-19 LibC patch	Recommended
105669-07 CDE 1.2: libDTSvc patch (dtmail)	Recommended
106409-01 Chinese TrueType Fonts patch	Recommended

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## Upgrade Issues

You can download the BuyerXpert 4.0 migration kit from the following URL:

<http://web.archive.org/web/20010807094048/http://www.iplanetcustomers.com/>

This site is password protected, so you will need to contact iPlanet technical support to obtain the user ID, the password, and instructions to access the migration kit from the site.

[Return to Top of Page](#)

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## Limitations and Known Problems



This section describes the limitations and known problems in BuyerXpert 4.0.

## Limitations

### Default Rule Instances

Do not remove or disable any default rule instances. BuyerXpert depends on the proper configuration of default rule instances.

### Reloading Frames

BuyerXpert is a frame-based application. Like any other frame-based application, using the browser's Reload button does not reload the frame. Instead, it attempts to reload the login page.

**Workaround/Solution:** Right-click the frame you want to reload, and select the reload option.

## Known Problems

- 512348 Using an ampersand (&) sign in data causes problems.
- 516051 Problems can occur when accounting code format is changed.
- 518426 The -i option (files directory) of the Import utility command-line interface does not work in interactive mode.
- 519219 iPlanet Application Server: Web server hangs during heavy loads.
- 519977 Non-catalog screen is confusing.
- 520099 Stopping the portal server stops the directory server and the web server.
- 520984 Internet Explorer: Shopping cart does not refresh correctly for a non-catalog item.
- 522843 Internet Explorer: Help button doesn't work on initial login.
- 522889 Netscape 6: Cannot view a Microsoft Word attachment.
- 523116 Multiple users cannot log into the same browser.
- 523123 Cannot resume an aborted import session.
- 523124 Viewing problems occur if web server is using port 80.
- 523159 Unexpected logouts occur when running Catalog Manager in a multiple kjs environment.
- 523299 Outbound requisition file can contain incorrect partial shipment information.
- 523491 Cannot view default contact list in certain rule circumstances.
- 523499 Using a plus (+) sign in data causes problems.
- 523522 State information for a newly created location may not show in the User interface.
- 523572 Purchase order does reflect changed payment information in the User interface.
- 523626 Deleted organizations are still displayed in a search for companies.
- 523636 Some inbound OBI orders do not display total amounts.
- 523648 Import performance for Priceltem begins to degrade after 1000 records.
- 523735 Warning messages appear when installing or loading schema.
- 523741 Cannot change the list price for an off-catalog item a second time.
- 523868 List price currency is not converted during a compare.
- 523898 Oracle "dbassist" tool does not create a UTF-8 database properly.
- 523952 Cannot add an item after comparing multi-catalog search results.
- 523962 A currency conversion problem can occur when the tax model is TaxWare.

[Return to Top of Page](#)

**512348 Using an ampersand (&) sign in data causes problems.**

Ampersand signs in data are converted to semicolons (;), which can cause problems.

**Workaround/Solution:** Do not enter an ampersand (&) in data.

### **516051 Problems can occur when accounting code format is changed.**

In the Admin interface, problems with incomplete requisitions or off-catalog commodity codes can occur if you change the accounting code format in such ways as:

- Changing default values
- Changing possible values so that existing values are no longer valid
- Changing dependencies so that existing sequences are no longer valid
- Adding or deleting segments
- Renaming segments

BuyerXpert has some ability to recover from these problems. For example, if you change the default accounting code values, then requisitions using the defaults will automatically receive the new defaults.

**Workaround/Solution:** If there are major changes to the accounting code structure, the best recourse is to edit the requisitions so that new accounting codes are added and the old codes are deleted.

### **518426 The -i option (files directory) of the Import utility command-line interface does not work in interactive mode.**

If you don't list the file names inside the command line, the Import utility will prompt you for the file names and use the current directory if the file names don't have a fully qualified directory path.

**Workaround/Solution:** List the file names in the command line, or use fully qualified file names.

### **519219 iPlanet Application Server: Web server hangs during heavy loads.**

This is an iAS web server connector problem. During heavy loads, the web server may stop responding and appear to hang. Eventually, the browser times out with an error.

**Workaround/Solution:** To keep working, disable the Java Virtual Machine (JVM) within iWS. To do this:

1. Run the iPlanet Web Server Administration Server. See <http://docs.iplanet.com/docs/manuals/enterprise/41/ag/esgstart.htm#1019078>
2. Use the Enable/Disable Servlets/JSP page in the Servlets tab in the Server Manager. See: <http://docs.iplanet.com/docs/manuals/enterprise/41/ag/esprgrm.htm#1019782>
3. On the Enable/Disable Servlets/JSP page, select NO for both Activate the Servlet Engine and Enable JSP. This allows the web server watchdog process (uxwdog) to restart the web server when the bug occurs, thus avoiding the hang.
4. Sometimes, the web server watchdog process fails to restart the web server. If you are running on a multi-processor (or want more reliability) it is advisable to configure the iPlanet Web Server for multi-process mode. See:

<http://docs.iplanet.com/docs/manuals/enterprise/41/ag/esperfrm.htm#1049437>

This increases the likelihood that the web server will be properly restarted, and can also benefit performance.

[Return to Top of Page](#)

### **519977 Non-catalog screen is confusing.**

The non catalog screen is used to search for products within the catalog or add non-catalog items to your shopping cart.

If you know the product code within your catalogs, enter it in the product code section and click Search. This takes you to the product within the catalog (where you can add to your shopping cart).

*Note:* You can also add a supplier company as part of your search criteria.

**Workaround/Solution:** If you want to add a non-catalog item, the following fields are required:

- product description
- commodity code
- estimated price
- quantity
- unit of measure

After filling in these required fields, click Add Item.

### **520099 Stopping the portal server stops the directory server and the web server.**

Stopping the ipsserver for the iPlanet Portal Server stops the iPlanet Web Server and the iPlanet Directory Server. This happens because the portal server shutdown script searches for all the ldap and iwsserver processes, and shuts them down.

**Workaround/Solution:** Edit the portal server shutdown script to search for the processes owned by root or the user ID under which portal server is running. Shut down those processes. Add the following line to the filter in the killdaemonproc() method in the ipsserver script: /usr/bin/grep root

### **520984 Internet Explorer: Shopping cart does not refresh correctly for a non-catalog item.**

This is an Internet Explorer problem. In the User interface, the shopping cart fails to refresh after a non-catalog item is added.

**Workaround/Solution:** Change your Internet Explorer options as follows: menu bar ->tools->internet options->temporary internet files->settings. Select Every Visit to the Page.

### **522843 Internet Explorer: Help button doesn't work on initial login.**

This is an Internet Explorer problem. The Help button on the login page doesn't work for initial login.

**Workaround/Solution:** Reload the page.

### **522889 Netscape 6: Cannot view a Microsoft Word attachment.**

This is a Netscape 6 problem. You might not be able to open a Microsoft Word email attachment if you use Netscape 6 as your browser.

**Workaround/Solution:** Right-click the attachment, then select "Open Link in New Window."

[Return to Top of Page](#)

### **523116 Multiple users cannot log into the same browser.**

BuyerXpert 4.0 does not allow more than one user to be logged in per browser. If more than one user logs into the same computer and into the same browser, they will share the same sessions, and problems can occur.

**Workaround/Solution:** Always log out in the following circumstances:

- You are finished with the session
- You want to log in as another user
- You want to use another iPlanet application

### **523123 Cannot resume an aborted import session.**

Once an import session has been aborted, it cannot be resumed.

**Workaround/Solution:** Restart the import session from scratch.

### **523124 Viewing problems occur if webserver is using port 80.**

If your web server is installed to run on (default) port 80, you will receive an "unauthorized" error message.

**Workaround/Solution:** If you are using port 80, remove port 80 from the URL. If you use any other port number for the web server, include that port number in the URL.

*Wrong way:*

`http://ruiyaksun.red.iplanet.com:80/NASApp/buyer/Login`

*Right way:*

`http://ruiyaksun.red.iplanet.com/NASApp/buyer/Login`  
`http://ruiyaksun.red.iplanet.com:2000/NASApp/buyer/Login`

[Return to Top of Page](#)

### **523159 Unexpected logouts occur when running Catalog Manager in a multiple kjs**

**environment.**

You cannot run the Catalog Manager in a multiple kjs environment.

**Workaround/Solution:** The URL to access Catalog Manager is:

`http://<host>:<port>/NASApp/buyer/imm/imm.jsp`

- Install a separate iPlanet Application Server with a single kjs process to run Catalog Manager. This iAS installation can be used exclusively for Catalog Manager.  
Or

- Configure the iAS that will run with multiple kjs processes:

1. Run the iAS administrative utility (ksvradmin or startconsole).
2. Select the application menu option.
3. In the left (navigation) frame, click ias/Default/System.
4. In the right frame, check the Sticky option for StaticServlet and JSPRunner.
5. To commit your settings, click Apply Changes.

**523299 Outbound requisition file can contain incorrect partial shipment information.**

For requisitions where partial shipments are not allowed (that is, orders can only be shipped complete), the generated EDI file can show the code SP (Ship Partial) instead of the code SC (Ship Complete).

**523491 Cannot view default contact list in certain rule circumstances.**

If you create a *new* rule instance to add more return values (such as contacts) for a rule instance that already exists, end users will not be able to see the original default values. For example, you have a `shipping_contact_list` rule that returns Jack and Mike, and you want to add another contact, Joe, to this list.

**Workaround/Solution:** Add the additional value to the same rule instance rather than creating a new rule instance. That is, add Joe to the same rule instance with Jack and Mike.

**523499 Using a plus (+) sign in data causes problems.**

If you use a plus (+) sign to create an organization unit name, such as "asia+east asia," you will receive an error message.

**Workaround/Solution:** Do not use a plus (+) sign when creating an organizational unit name.

**523522 State information for a newly created location may not show in the User interface.**

If you save location information on the Status and Contact Information screens, the value set for State (located on the General Info screen of the Admin interface) is erased.

**Workaround/Solution:**

- Use the Import utility rather than the Admin interface for frequent updates to location

information.

Or

- Make a note of the value set for State on the General Info screen, then restore the previous State value and save General Info.

[Return to Top of Page](#)

### **523572 Purchase order does not reflect changed payment information in the User interface.**

If you change the payment information on the Purchase Order screen in the User interface, the default payment information is still used. You are not able to select a payment instrument other than the default.

BuyerXpert selects a payment instruments as follows:

1. Evaluates the PAYMENT\_SUBTYPE\_DEFAULT rule.
2. Selects an instrument of the subtype specified by the rule, as long as the amount of the resulting purchase order is within the limit specified by the rule.  
If the amount is greater, or if there are no instruments of this subtype that the user is allowed to use, the PAYMENT\_SUBTYPE list rule is evaluated, and the first subtype that has the required limits and usable instruments is selected

**Workaround/Solution:** To specify a payment instrument, use the Admin interface to create the instrument and set this instrument's subtype, for the user, as the value for the PAYMENT\_SUBTYPE\_DEFAULT rule.

### **523626 Deleted organizations are still displayed in a search for companies.**

During a search, all companies appear, even if they are logically deleted.

**Workaround:** Physically delete the organization from the LDAP tree.

### **523636 Some inbound OBI orders do not display total amount.**

When attempting to insert orders into Buyer through OBI, the inbound files do not have an AMT segment or an order total.

**Workaround/Solution:**

1. Specify that BuyerXpert will only accept inbound files that have an AMT segment or an order total.
2. Implement the specification.
3. Change BuyerXpert so that it recognizes that no AMT segment is present.
4. Add the individual price totals from each line item and display that total in BuyerXpert. Also, specify that the same total should be sent to the supplier.

### **523648 Import of price items degrades after 1000 records.**

During the import process for PriceItem, performance begins to degrade after approximately 1000

records are added. Eventually, this causes an "out-of-memory" error.

**Workaround:** Import PriceItem records in smaller sets of 1000 records, and increase the memory of the KJS process.

[Return to Top of Page](#)

### **523735 Warning messages appear when installing or loading schema.**

The following messages can appear when you load sample data and schema:

ldap\_modify: Type or value exists  
ldap\_modify: additional info: The attribute "memberOf" already exists.  
ldap\_modify: Operations error  
ldap\_modify: additional info: Suffix "o=iplanet.com" already exists.  
ldap\_add: Already exists

**Workaround/Solution:** These are warnings indicating that the specified entry already exists. You can safely ignore these messages.

### **523741 Cannot change the list price for an off-catalog item a second time.**

For off-catalog items, changing the list price a second time may cause an error.

**Workaround/Solution:** Delete the line item and re-add it.

### **523868 List price currency is not converted during a compare.**

When you compare items in the catalog, the list price does not get converted to user-preferred currency.

**Workaround/Solution:** You can view the converted list price while browsing the catalogs, and also while viewing item details.

### **523898 Oracle "dbassist" tool does not create a UTF-8 database properly.**

If you use "dbassist" to create a UTF-8 database, the database will not be properly configured for UTF-8 causing "object stale exception" errors to occur in BuyerXpert.

**Workaround/Solution:** Make sure the following parameters are properly set:

- Database character set UTF8
  - Database NATIONAL character set UTF8
- For Oracle client environment: NLS\_LANG set to AMERICA\_AMERICA.UTF8

[Return to Top of Page](#)

### **523952 Cannot add an item after comparing multi-catalog search results.**

A multi-catalog search involves searching from the main catalog browse page, or from any other page, selecting All Catalogs, and then invoking Compare Items by selecting two or more items from the search results page. If you do a multi-catalog search, you will not be able to invoke Add to Cart from the page that displays the comparison.

**Workaround/Solution:** Add the items from search results page or from the item details page.

### **523962 A currency conversion problem can occur when the tax model is TaxWare.**

When the tax model is TaxWare and the display currency is different from the common currency, the error "No conversion is available" appears.

**Workaround/Solution:** Use the BuyerXpert custom tax model if common currencies are different from display currencies.

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## **How to Report Problems**

If you have problems with your BuyerXpert system, contact iPlanet customer support using one of the following mechanisms:

- iPlanet online support web site at <http://web.archive.org/web/20010807094048/http://www.iplanet.com/support/online/>  
From this location, the CaseTracker and CaseView tools are available for logging problems.
- The telephone dispatch number associated with your maintenance contract

So that we can best assist you in resolving problems, please have the following information available when you contact support:

- Description of the problem, including the situation where the problem occurs and its impact on your operation
- Machine type, operating system version, and product version, including any patches and other software that might be affecting the problem
- Detailed steps on the methods you have used to reproduce the problem
- Any error logs or core dumps

[Return to Top of Page](#)

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